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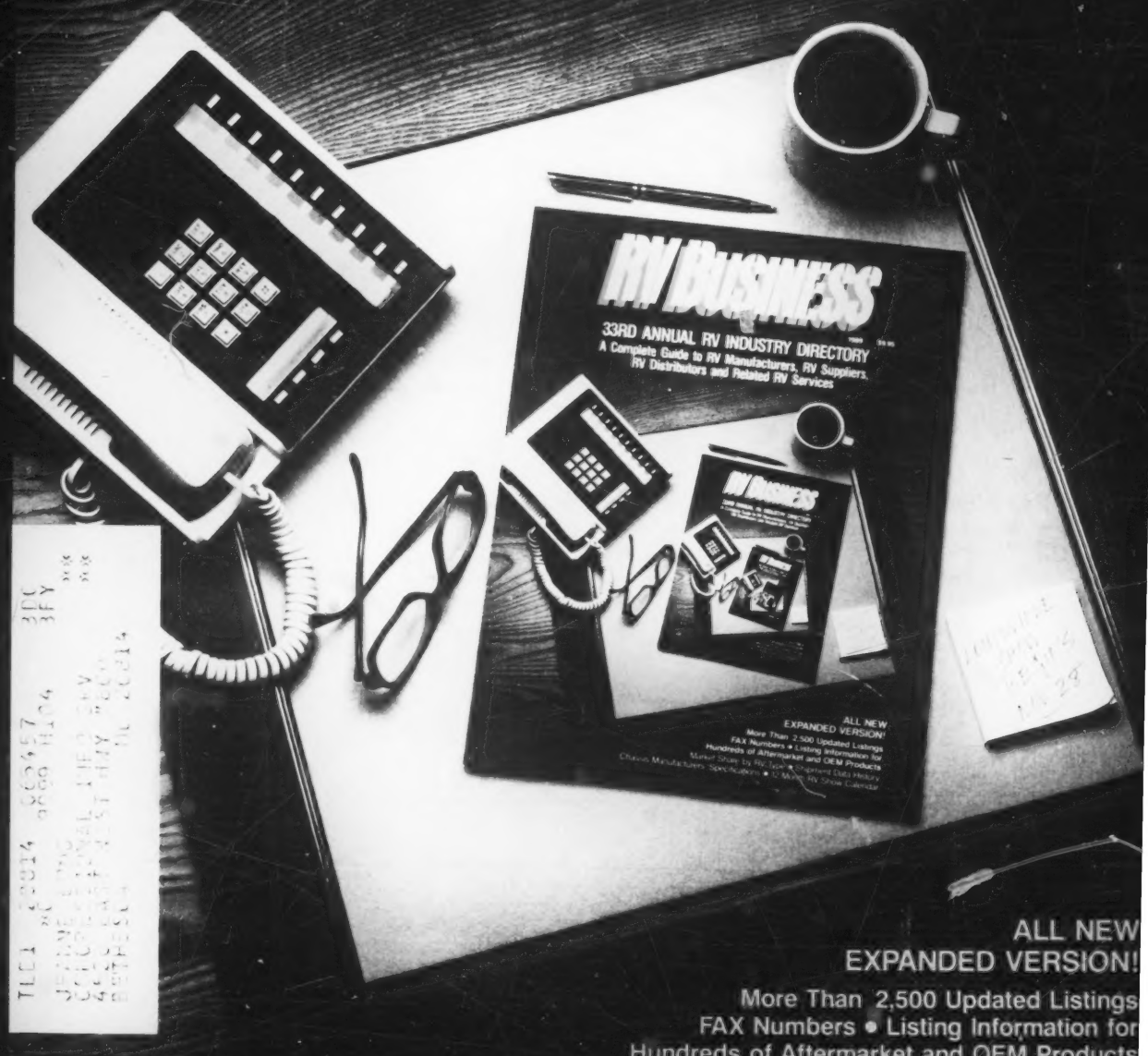
A Complete Guide to RV Manufacturers, RV Suppliers, RV Distributors and Related RV Services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Market Share by RV Type • Shipment Data History
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STATISTICAL OVERVIEW OF THE RV MARKET

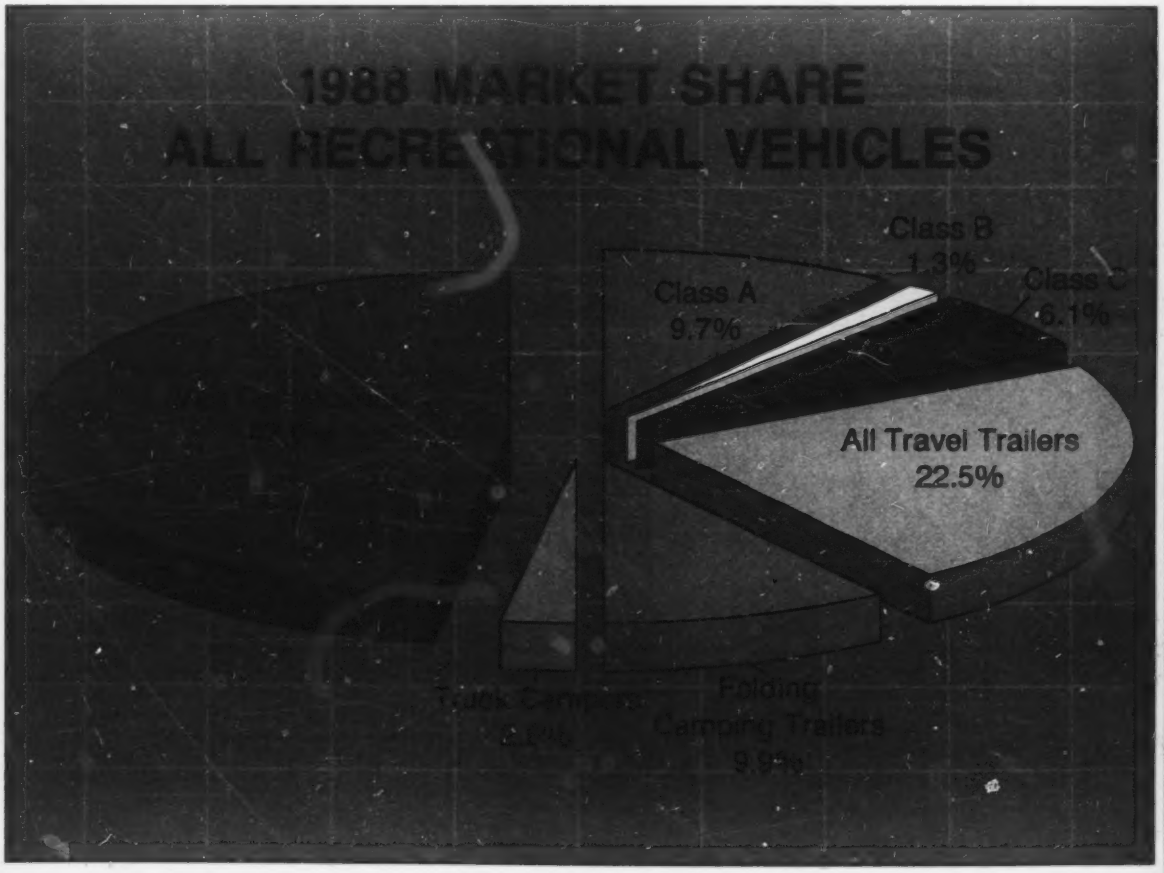
Shipments of van conversions increased market share in 1988, climbing from 45.5% in 1987 up to 47.9%. This gain was predominantly at the expense of motorhomes, which dropped from 18.5% of the market in 1987 to 17% in 1988. That 1.5 percentage-point drop in market share exceeded the 1.1-point drop, from 36.1% to 35%, of the much larger market share of towables (travel trailers, folding camping trailers and truck campers).

This is all part of a long-term trend. In 1978, van conversions accounted for just over one-quarter of the market (26.3%), climbing to 43% in 1983 and now threatening to hit the halfway mark of 50% in the years ahead.

If van conversions are excluded, it is clear that towables have been favored over motorhomes in the RV marketplace.

Excluding van conversions, motorhomes had 41.1% of the market in 1978 and towables had 58.9%. It should be noted that 1978 was a high point for motorhomes, in terms of market share. Since then, motorhomes have lost a little more than 8 market-share points to towables. When 1988 closed, motorhomes were down to less than one-third of the market (excluding van conversions), and towables had more than two-thirds.

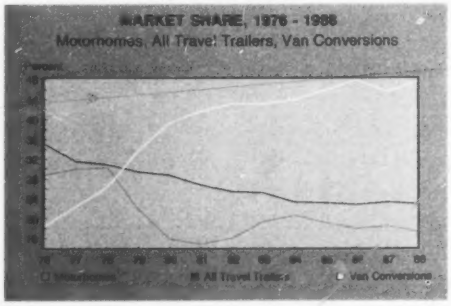
MORTON J. MARCUS



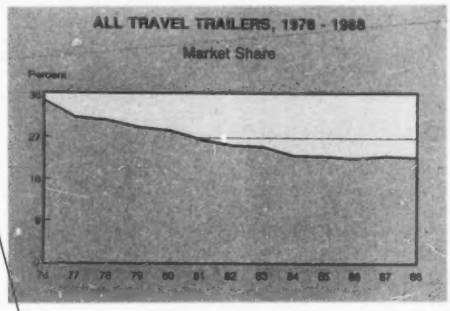
ALL GRAPHICS IN THIS SECTION BY CUSTOM COLOR VISUALS

Morton J. Marcus is the director of the Indiana Business Research Center at Indiana University School of Business, where he is also a member of the faculty. Marcus specializes in using statistics to identify economic trends.

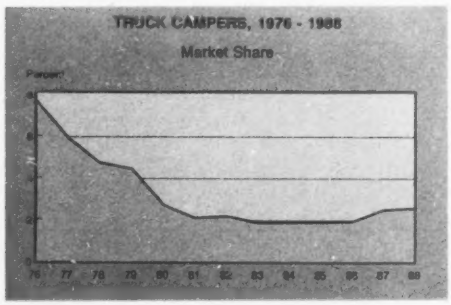
MARKET SHARE BY RV TYPE



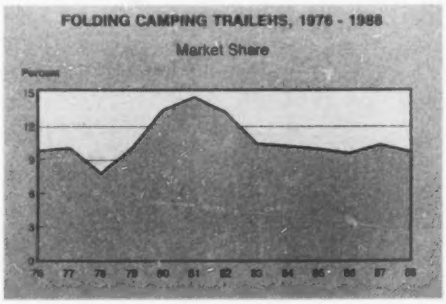
Motorhomes and travel trailers were about equal in terms of market share in 1978, but reacted with dramatic differences to the 1979-84 decline and recovery period, as van conversions continued to increase market share.



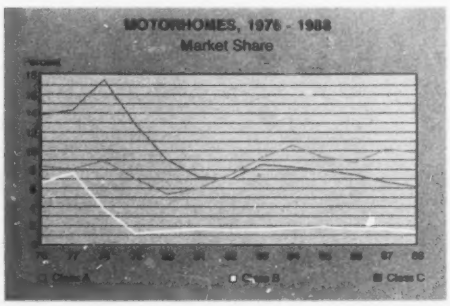
Travel trailers (including conventional, park and fifth-wheel trailers) have dropped almost without exception in market share from 1976 when they held 35% of the market to their place at 22.5% in 1988. Between 1984 and 1987, they have held steady between 22.7% and 23.2%.



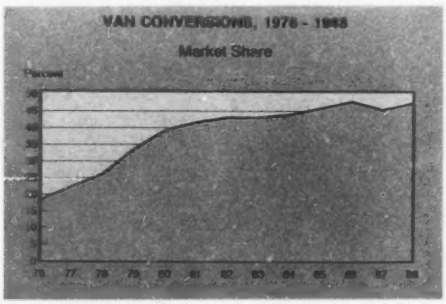
Truck campers lost market share rapidly from 1976 until 1981. They fell from 7.8% to 2.1% and then held just about constant until 1987, when they moved up to 2.5%. They showed another slight gain in 1988, rising to 2.6%.



Folding camping trailers had about the same market share in 1988 (9.9%) as they did in 1976 (9.8%). In between, they ranged as low as 7.8% in 1978 to a peak of 14.6% in 1981. Yet, in 13 years, only four years have been outside the 9% to 10% range.



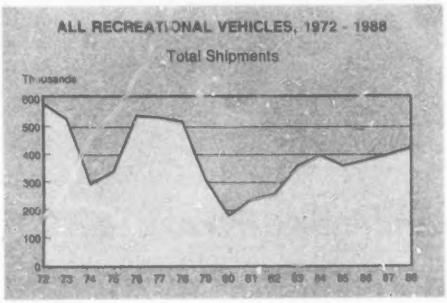
Class A motorhomes hit their low (5.4%) in market share in 1980. A year earlier, Class B units hit their low – a 1.1% – and have hardly increased since. Class C units reached their low - (7%) in 1982 after peaking (17.6%) in 1978 when C's were 58% of the motorhome market. By contrast, in 1988, it was Class A units that had 57% of motorhome shipments.



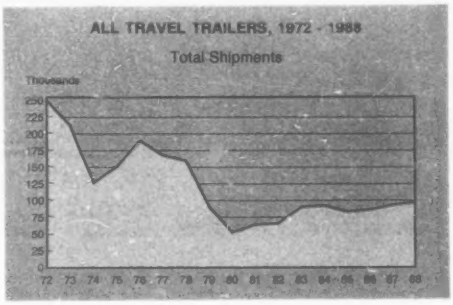
For the 11th time in the past 13 years, van conversions gained market share in 1988. The big gains (from 18.5% in 1976) have slowed, but at 47.9% of the market in 1988, van conversions were even with their peak of 47.9% in 1986.

ANNUAL SHIPMENTS BY RV TYPE

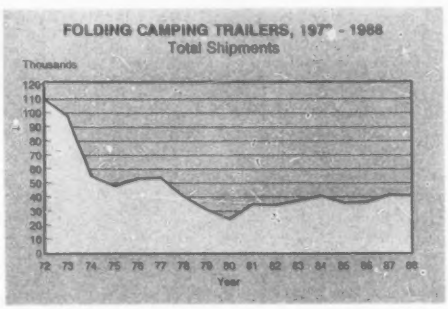
The RV industry was battered twice in the past two decades: once in the oil crunch of 1974 and again in 1979-80 by the oil-inflation-recession triple economic whammy. But no two model types had identical experiences. Since 1984, there has been a divergence of experience, with some types advancing and others failing to benefit from an expanding economy. The following charts tell this diverse story:



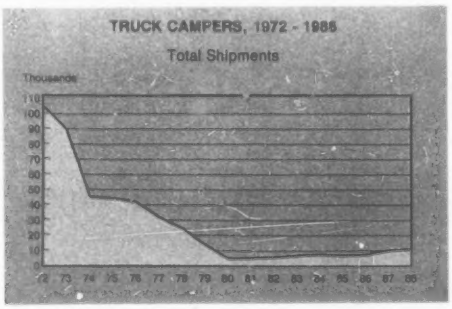
Total shipments rose for the third consecutive year in 1988, rising to 431,050 units, a 7% increase over 1987. This puts shipments more than 240,000 units ahead of the low point of 1981 and at their highest level since 1978. At the rate of growth realized since 1985, it will take four more years of sustained growth (to 1992) before shipments return to the 1978 level.



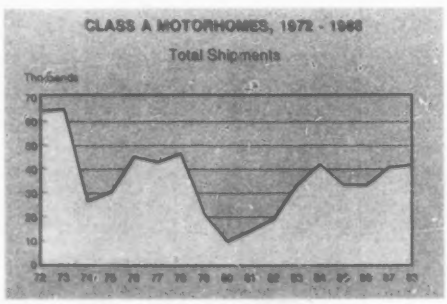
In 1988, travel trailers (conventional, park and fifth-wheel trailers) had their best year since 1978, with 97,170 units shipped. Since 1983, travel trailers (including fifth-wheels and park models) have moved in a range between 83,000 and 97,000 units, averaging 90,000 units a year.



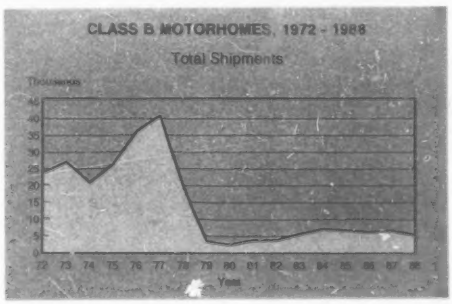
Except for the recession low of 1980, folding camping trailers have moved between 31,000 and 41,000 units annually between 1978 and 1987. In 1988, they reached 42,740 units, just above their 1987 high for a 1.6% increase.



Truck campers have been increasing in shipments almost continuously since 1980. Although well below their peak in the early 1970s, these units have shown consistent advances once their new place in the market was established. In 1988, truck-camper shipments rose to 11,110, an 8.4% increase over 1987.

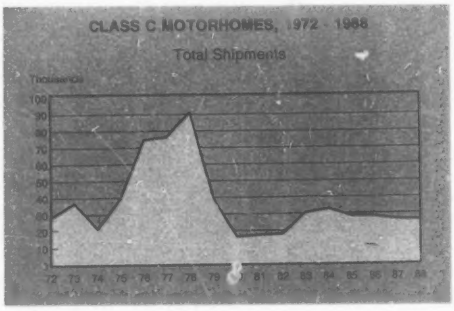


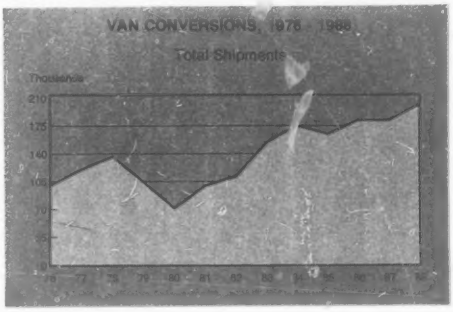
Class A motorhomes again are reaching for the 1978 peak of nearly 47,000 units. In 1988, at 41,620 units shipped, they were still a little more than 5,000 units short of that point, but more than 30,000 units above the low reached in 1980. Although 1988 saw only a 1.4% rise over 1987, the climb of these hallmarks of the industry has been at an annual rate of nearly 20% from the beginning of the decade.

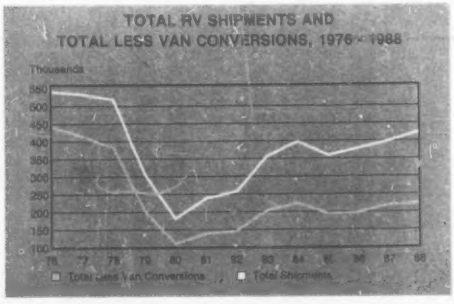


Class B motorhome shipments were lower for the fourth consecutive year in 1988, down by 23.3%. Hit severely from 1978 through 1980, they have not surpassed the 7,100 mark of 1984 when their recovery peaked.

ANNUAL SHIPMENTS BY RV TYPE







Class C motorhomes (top left), after recovery from the recession, have been on a downward slide since 1984. In 1988, shipments were at 26,420, up only 20 units from 1987. They were 60% above their low of 1980, but off by 20% from the 1984 high. Van conversions (top) hit a record in 1988, crossing the 200,000-unit level for the first time to reach 206,570 shipments. The upward march from 1980 has been interrupted only once (1985). Total shipments less van conversions in 1988 were just a little above 1984's post-recession recovery high. With van conversions included, the industry is 137% above its 1980 low, but still 20% below the level of 1976. Without van conversions, the industry is 104% above the 1980 low, and just half of its 1976 volume.

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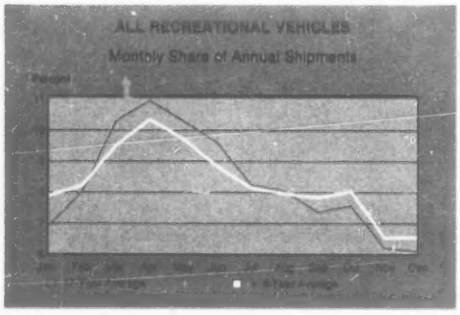
MONTHLY SHARE OF ANNUAL SHIPMENTS

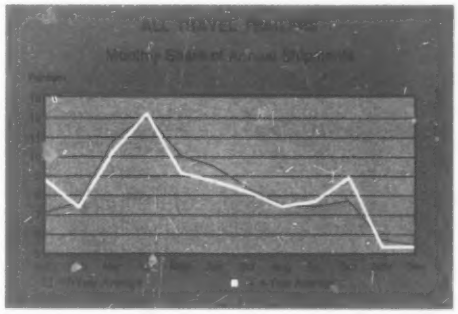
Based on 17 years of RVIA shipment data, it is evident that the RV industry has distinct seasonal patterns. Not all model types, however, have the same pattern. Recent analysis shows that these patterns may be changing in recent years.

Over the 17-year period, total RV shipments varied from a low of 6.1% in December to a high of 11% in April, a spread of nearly 5 points. For the more recent four-year period, the spread has been reduced to 3.8 percentage points.

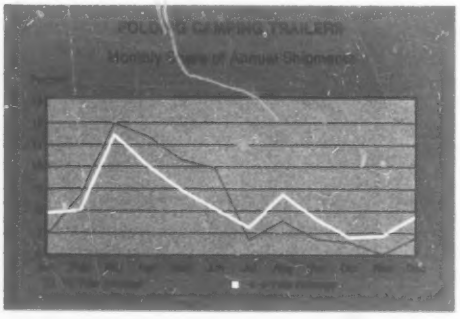
This flattening of shipments through the year may reflect changes in the geographic pattern of sales (more sales in less fluctuating climates, such as California), changes in the mix of product shipped, and/or improved communications between dealers and manufacturers. In any case, it changes the timing of inventories, production and transportation demands. The results could be better cost control, improved profits and better prices for consumers.



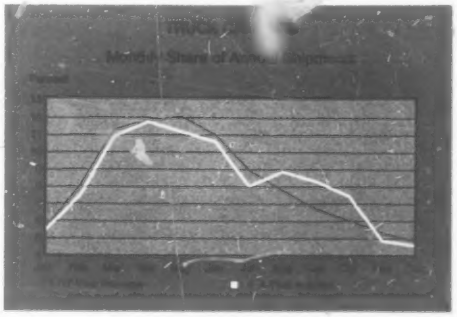
All RV shipments peak in April, but recently January and February are higher portions of the total year than in earlier years. Likewise, the share of shipments in the last third of the year is 29.1%, compared with 27.4% over the longer period.



Travel trailers now show February as a weaker month than January. The peak in April remains the same at 12.3%, but there is now a stronger early fall with September and October accounting for 16.7%, compared with 15.2% earlier.

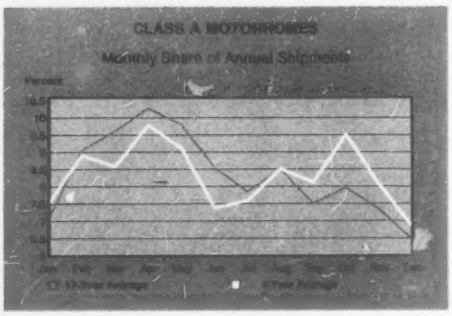


Folding camping trailers peak in March at 11% of annual shipments or better. But February through June are not as strong as formerly, with July through January taking up the slack. The August secondary peak is now 1.2% higher than in the longer historic period.

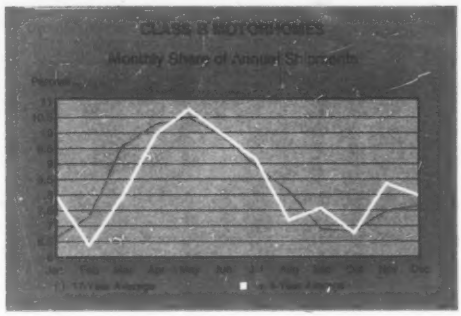


Truck campers run at fairly even high levels from March to June. But, whereas there was a continuous decline previously from a May peak, the month of August shows a secondary peak with higher subsequent shipments in September and October.

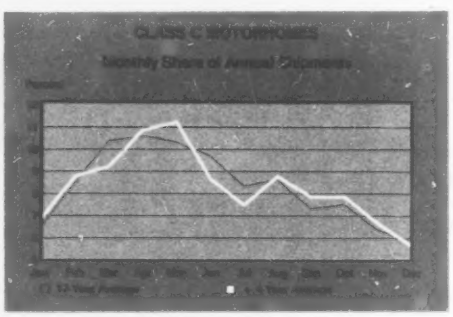
MONTHLY SHARE OF ANNUAL SHIPMENTS



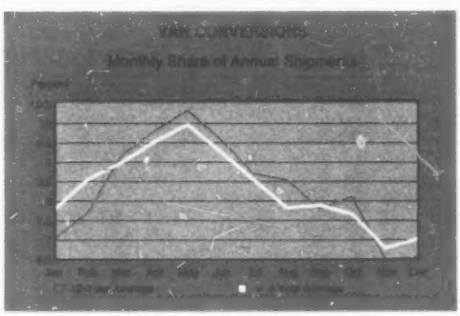
Class A motorhomes now show a secondary peak almost as high as the primary peak in April. This reduction in seasonality means that where there had been four months (February through May) above 9% of annual shipments in the old pattern, now there are only two months (April and May).



Class B motorhomes show little change in seasonal pattern. February through April are now somewhat weaker months than earlier, but the May peak is a bit higher and there is a stronger kick to the end of the year.



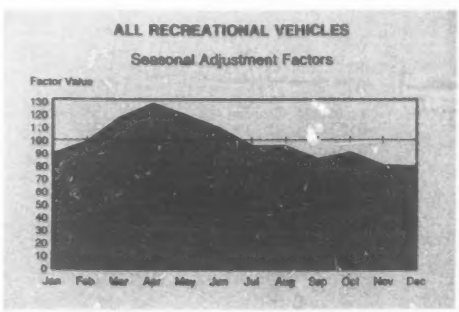
The peak for shipments of Class C motorhomes has shifted from April to May, even though April is now a stronger month of the year than before. This has resulted from a dramatic rise from March to the April level and a sharp decline from the peak to the June and July levels. The rest of the year remains little changed.



In recent years, van conversions have shown more strength through the winter months (November through February) and less strength in the remaining months (September being an exception). The difference between the peak in May and the low in November is reduced as shipments are somewhat more evenly distributed through the year. Δ

WHY MAKE SEASONAL ADJUSTMENTS?

Many important economic indicators, such as the gross national product (GNP) and the Consumer Price Index, are "seasonally adjusted." Seasonal adjustments are mathematical corrections of real numbers to remove the distorting influence of regular fluctuations. Once such seasonal fluctuations have been removed, a single month can be more accurately compared with another, and data can be used more reliably for forecasting purposes.



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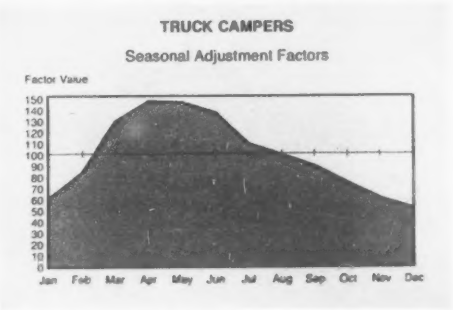
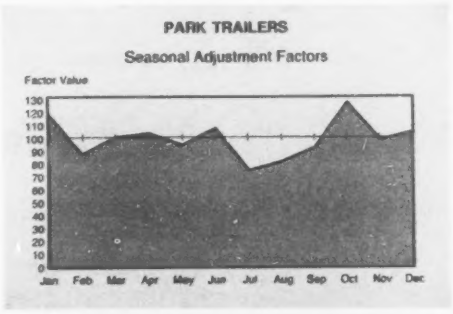




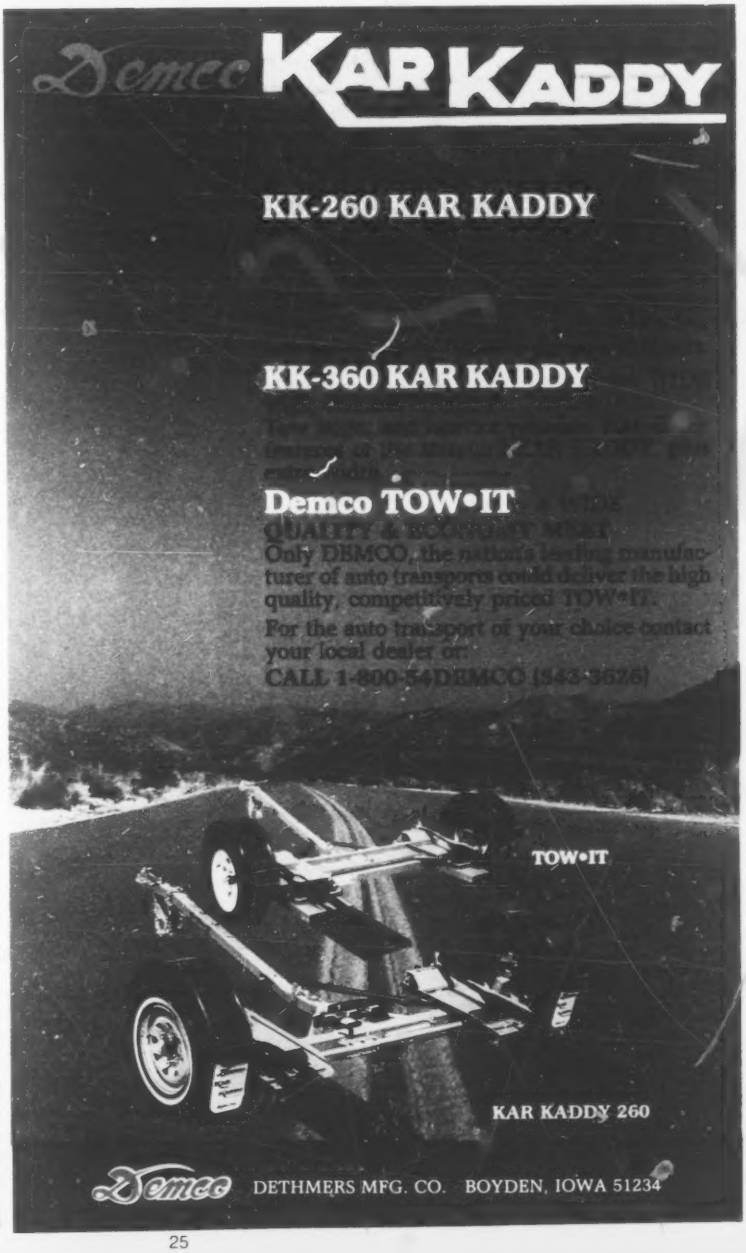
RV shipments, for instance, show strong seasonal patterns. The process of seasonally adjusting RV shipments is simple mathematics, once an adjustment factor has been determined.

The starting point in finding the seasonal adjustment factor is determining the percent of total annual shipments that are typically made in a given month. This information should be based on at least three years of data, and, in the cases shown here for the RV industry, it is based on 10 years of data.

For all RVs, April, for example, is often the peak month, with more than 11% of the year's total. December accounts for just 6% of the total. But the pattern varies greatly by class of RV. Van conversions peak in May. Class C motorhomes have a high plateau from February through May; truck campers have a wide range from a high of nearly 13% in May to a very low 3% in December. This segmentation of RVs into their respective classes is an important part of the seasonal adjustment process and allows the behavior of those products to be seen in a truer light.

To derive seasonal adjustment factors, the statistician assigns a value of 100 (or 1) to the average month. Then a specific month is measured as a percentage of that average month. For instance, when we analyze the history of RV shipments in this decade through 1988, we find that January accounts for 9.5% of the year's total RV shipments. Thus, the seasonal adjustment factor for January is 90.1 (100 · 9.5 · 90.1).

To seasonally adjust the raw data, then, the actual January shipments would be divided by 0.901. If we were actually doing this procedure in early 1988, the resulting number could have been multiplied by 12 to forecast shipments for the full year. Plotting seasonally adjusted months against GNP or other indicators gives you a clearer idea of how RVs are behaving relative to those aspects of the overall economy. Δ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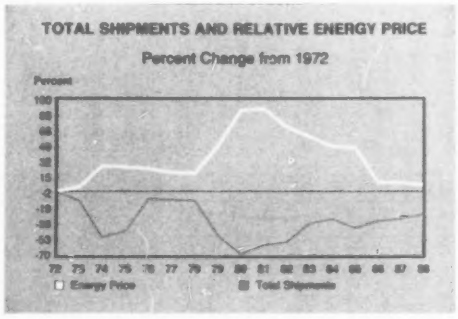
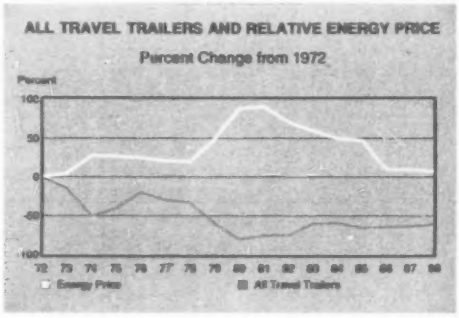
ECONOMIC FACTORS AFFECTING RVS

Two factors play critically important roles in the large swings of the industry. One major factor our research has shown is that it is not the price of petroleum products (either for running a motorized unit or for running the vehicle that tows an RV) which is critical. Rather, it is that price compared with the price of all consumer products which is one determinant of RV shipments.

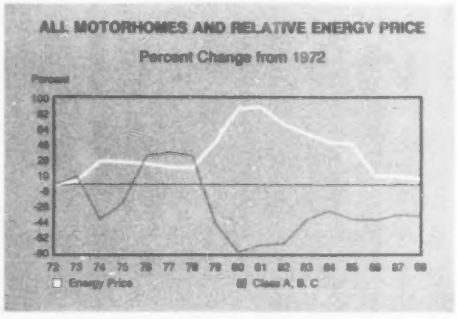
A second major factor is the prevailing interest rate (easily measured by the prime interest rate). Since these forces work in an interacting fashion, definitive patterns are not evident. But this set of charts does suggest how different classes of units fluctuate with changes in these factors. The year 1972 is taken as a base in all but the van-conversion case.



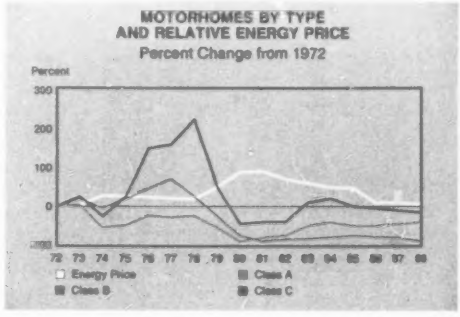
The percent changes from 1972 levels of total shipments and relative energy prices look like mirror images of each other. All years show that total RV shipments are below the 1972 level, with the deepest drops corresponding with the sharpest rises in energy prices above the 1972 level. However, in recent years, relative energy prices have been falling close to a position near the 1972 level, but RV shipments have not made a similar correction.



Travel trailers show a pattern very much like the total RV picture. Closer analysis, however, reveals that the response of travel trailers to the restoration of the relative price of energy back toward the 1972 parity level has not been of any significant consequence.

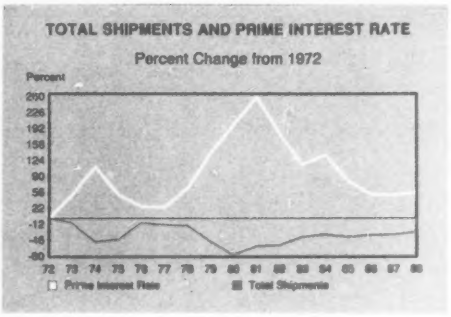


Motorhomes showed a fall in 1974 when energy prices moved up sharply, but then these units rose dramatically above 1972 levels in the recovery years of 1976 through 1978. The sharp energy-price rises of 1979 and 1980 took their toll on motorhomes, but the recovery in relative energy prices was mirrored by an improvement in motorhome shipments until 1984. Thereafter, the improvement in relative energy prices failed to have any noticeable effect on motorhomes.

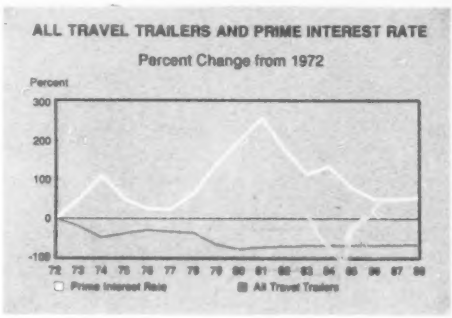


When motorhomes are looked at in detail, it can be seen that Class A units mirror relative energy prices fairly well. Class B units have had virtually no relationship to these prices since the jumps of 1979 and 1980. Class C units, in contrast, ran up large gains in the 1970s, only to take a major fall in 1979-80. They then recovered in line with the energy-price movements of the early 1980s, only to stagnate in more recent years.

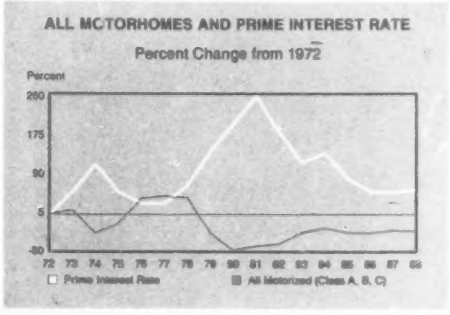
ECONOMIC FACTORS AFFECTING RVS



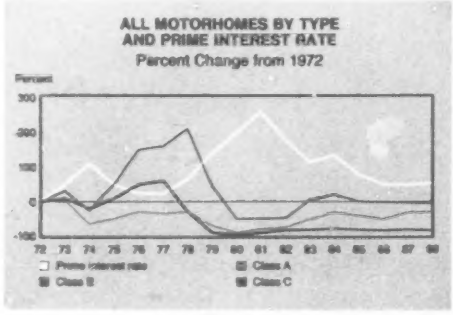
Total shipments and the prime interest rate also demonstrate symmetry, although an uncertain lag is suggested. Prime rates peaked in 1981, but the low for shipments occurred a year earlier. The prime rate fell in 1985, but so did shipments. The rise of interest rates in 1988 may not show up until 1989.



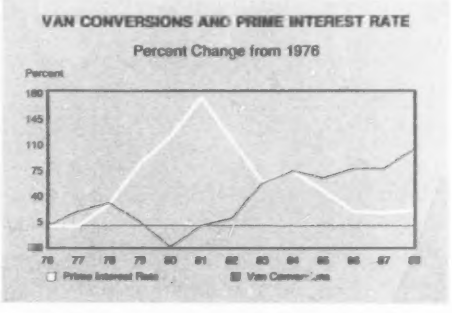
Travel trailers moved with interest rates fairly well until 1980. Since that low point, however, the relationship breaks down. Shipments of travel trailers showed some improvement as rates declined in 1981 and 1982, but less reaction to more recent changes.



Motorhomes advanced in 1973 when interest rates rose, but fell back before still higher rates in 1974. As rates declined, motorhomes improved, only to be stopped in their tracks in 1978 as rates began to climb. Declining rates in 1982-83 brought motorhomes back, but since 1984, the relationship between the prime rate and motorhomes has been weak.



When Classes A, B and C are broken out, it appears that Class A units follow the inverse of the prime-rate pattern. Class B motorhomes clearly had other forces operating on them in later years. Class C units are affected by changes in the prime rate, but these units also seem subject to separate forces in the marketplace.



Van conversions have a strong tendency to buck the trend. Rising rates in 1978 did not slow their climb. Nor did the very peak of the prime rate in 1981 keep them from advancing beyond their low of 1980. Falling rates thereafter helped van conversions, but only the increase of 1986 seems to have had the expected inverse result. Δ